

Zoho Sidekick — User Manual

Version: 1.1

Date: February 2026

Document Classification: Public / Customer Guide

Welcome

Welcome to **Zoho Sidekick**, your all-in-one integration between Zoho CRM and Microsoft Outlook. This guide will walk you through the installation, configuration, and daily use of the product to ensure your team maximizes productivity.

Support & Help

For assistance with Zoho Sidekick, please contact us:

- **Email:** sidekicksupport@smbdyn.com
- **Support Portal:** <https://smbdyn.com/services/support>
- **Phone Number:** 720-897-6292

Table of Contents

1. What is Zoho Sidekick?
2. Installation & First-Time Setup
3. Dashboard
4. Contact Sync
5. Creating Records from Outlook
6. Smart Features
7. Administrator Guide
8. Zoho CRM Widget (Settings Panel)
9. Working with Multiple Organizations
10. Logging Out
11. Frequently Asked Questions

1. What is Zoho Sidekick?

Zoho Sidekick connects your Zoho CRM with Microsoft Outlook so you can:

- **Create CRM records** (Contacts, Accounts, Leads, Deals, Cases, Tasks, and Meetings) directly from your email — without switching between apps.
- **Sync contacts** from Zoho CRM to your Outlook address book automatically.
- **Associate emails** with CRM records so your team has full visibility into customer communication.
- **Upload attachments** from emails to CRM records with a single click.

The product works in two places:

Component	Function
Outlook Add-in	A sidebar panel inside Outlook (desktop and web) for creating records and viewing CRM data.
Zoho CRM Widget	An embedded settings panel inside Zoho CRM for admins to monitor sync progress and manage users.

2. Installation & First-Time Setup

This section provides complete step-by-step instructions for first-time users who have purchased the extension.

Prerequisite: Install the Zoho CRM Extension

Before installing the Outlook add-in, you must first install the required extension within Zoho CRM itself.

- **Download the Extension:** You will need to download and install the Zoho extension first.
- **Verify Installation:** Once installed, you can check and verify it directly from your Zoho CRM Settings.
- **Automatic Webhooks:** *Note that installing this extension automatically installs and configures the necessary webhooks for real-time data synchronization.*

2.1 Option A: Install from Microsoft AppSource

1. **Open Microsoft Outlook.**
2. **Navigate to Add-ins:**
 - Outlook Desktop: Click **Home** → **Get Add-ins**.
 - Outlook Web: Click the ⋮ (more options) icon → **Get Add-ins**.
3. **Search for the Add-in:**
 - Type "Zoho Sidekick" in the search bar.
 - Select the add-in from the search results.
4. **Install:**
 - Click **Add** or **Get it now**.
 - Review and accept the permissions.
5. **Verify Installation:**

- The "**Show Zoho Sidekick**" button should now appear in your Outlook ribbon/toolbar.
- Note: You may need to restart Outlook for the button to appear.

2.2 Option B: Manual Installation via Manifest File

This method is useful for IT administrators deploying to multiple users or for testing purposes.

1. **Outlook on the Web:**
 - Go to **Settings (gear icon)** → **View all Outlook settings** → **General** → **Manage Add-ins**.
 - Click **+ My add-ins** → **+ Add from file**.
 - Upload the `manifest.xml` and click **Install**.
2. **Outlook Desktop (Windows/Mac):**
 - Click **File** → **Manage Add-ins**.
 - Click **My add-ins** → **+ Add a custom add-in** → **Add from file**.
 - Select the file and install.

2.3 First Login: Connect to Zoho CRM

1. **Open the Add-in:** Open any email and click the "**Show Zoho Sidekick**" button in the ribbon.
2. **Login:** Click the "**Login**" button in the sidebar.
3. **Authentication:**
 - A popup will appear. Enter your **Zoho CRM** credentials.
 - **Grant Permissions:** Click **Accept** to authorize the integration.
4. **Success:** The sidebar will load the Dashboard showing your profile.

2.4 Connect Your Microsoft 365 Account

To enable contact synchronization, you must connect your Microsoft account.

1. Navigate to the **Home** screen in the sidebar.
2. Locate the **Microsoft 365 Integration** card (Status: Not Connected).
3. Click "**Connect to Microsoft 365**".
4. Sign in with your Microsoft credentials and grant the requested permissions.
5. **Verification:** The card will now show **Status: Connected ✓** with your email address.

3. Dashboard

3.1 Home

The Home screen displays:

- **Profile Info:** Name, email, Zoho CRM role, and Organization.

- **Integration Status:** Microsoft 365 connection status.
- **Admin Controls:** (Visible only to Admins of Organization) Settings for sync and data formats.

3.2 Creating CRM Records

The navigation menu provides quick access to create:

- **Create Contact / Account / Lead**
- **Create Deal / Case**
- **Create Task / Meeting**

Note: Visible items depend on your organization's configuration.

3.3 Organization Settings

Manage multiple Zoho CRM organizations here:

- View connected organizations.
- Switch active organization.
- Add new organizations or Logout.

4. Contact Sync

4.1 How Contacts Sync Works

- **Zoho to Outlook:** All Zoho CRM contacts you have access to are automatically synced to your Outlook address book under a specific category.
- **Real-Time:** Updates in Zoho CRM reflect in Outlook immediately.
- **Security:** Sync follows Zoho CRM data sharing rules.

4.2 Two-Way Sync

Requires two-way sync enablement.

- **Outlook to Zoho:** Changes made to contacts in Outlook (create/edit/delete) sync back to Zoho CRM.
- **Scope:** Only applies to contacts within the category; personal Outlook contacts are not touched.

5. Creating Records from Outlook Add-On

The add-on allows you to create detailed records:

5.1 Contacts & Leads

Includes First/Last Name, Email, Phone, Mobile, Title, Department, and Linked Account.

5.2 Accounts

Includes Account Name, Website, Phone, and Description.

5.3 Deals

Includes Deal Name, Amount, Stage, Closing Date, and Linked Contact/Account.

5.4 Cases

Includes Subject, Origin, Status, Priority, and Linked records.

5.5 Tasks & Meetings

Includes Subject/Title, Due Dates/Times, Priority, Status, and Participants.

6. Smart Features

6.1 Auto-Prefill from Email

The system parses the open email to automatically fill:

- Sender Name & Email
- Phone Numbers (from signature)
- Company Name
- Body (into Description)

6.2 Duplicate Detection

Before creating a Contact/Lead, the system checks Zoho CRM for existing emails. You will be alerted to **Update** the existing record instead of creating a duplicate.

6.3 Email Association

Link the current email to a CRM record to save the conversation in the Zoho CRM Timeline/History.

6.4 Attachment Uploads

View a preview of email attachments and select files (up to 10 MB) to upload directly to the CRM record. If link email toggle is selected.

7. Administrator Guide

7.1 Initial Setup

Upon first Admin login, the system runs an **Initial Sync** for Profiles, Roles, Data Sharing Rules, Users, Accounts, and Contacts.

Note: Users should wait for this sync to complete before logging in.

7.2 Microsoft Admin Consent

Why is this needed?

A Microsoft Organization Administrator must grant global consent on the Microsoft side to authorize the Zoho integration. This organizational approval allows individual users within your company to successfully connect their Microsoft 365 accounts to the add-in.

1. Go to **Dashboard Home** → **Microsoft Admin Consent**.
2. Click "**Request Admin Consent**".
3. Sign in with a **Microsoft Admin** account and accept permissions.

If users on the Microsoft side are still having trouble connecting their Outlook account, follow these steps:

1. Open the **Azure Portal**.
2. Navigate to **Enterprise Applications**
3. Locate and open the **Contacts Sync** Enterprise App
4. Go to **Users and Groups**.
5. Add the affected users to the application and assign appropriate permissions.

This will grant them the necessary access to connect their Outlook account.

7.3 Admin Controls

- **Two-Way Sync:** Toggle On/Off.
- **Soft Delete:** Retain deleted Outlook contacts for 30 days (On) or delete immediately (Off).
- **Date Format:** Set display format (e.g., DD/MM/YYYY).

7.4 Module Management

Enable/Disable specific modules (e.g., hide "Deals") to control what users can create via the add-in.

7.5 & 7.6 Sync Operations

- **Sync Permissions:** Use after changing Roles/Rules in Zoho.
- **Sync All Contacts:** Use to force a full re-sync of Outlook contacts for all users.

8. Zoho CRM Widget (Settings Panel)

Located inside Zoho CRM.

8.1 Home Tab

Displays record counts and last webhook activity timestamps.

8.2 Sync Progress Tab

Visual progress bars for the Initial Sync (Profiles, Roles, Data, Users, Contacts).

8.3 Users Tracking Tab

Lists all users, showing their Microsoft connection status and CRM Role.

8.4 Jobs Tracking Tab

Technical log of background jobs (Queued, Processing, Failed) for troubleshooting.

9. Working with Multiple Organizations

- **Switching:** Use **Organization Settings** to toggle between CRM instances.
- **Independence:** Each organization has independent settings and Microsoft connections.
- **Setup:** You must login and connect Microsoft for each organization separately.

10. Logging Out

10.1 Microsoft Account Logout

- **Location:** Home Screen → Microsoft Integration Card.
- **Effect:** Stops sync and removes mapped contacts from database. Affects all organizations linked to that Microsoft account.

10.2 Organization Logout

- **Location:** Organization Settings.
- **Effect:** Disconnects the add-in from that specific CRM instance.

11. Frequently Asked Questions

Q: I installed the add-in but don't see the button.

A: Restart Outlook. Check **File** → **Manage Add-ins** to ensure "Zoho Sidekick" is enabled.

Q: My contacts are not syncing.

A: Ensure you clicked "Connect to Microsoft 365" on the Dashboard. Ask your Admin if the "Initial Sync" is complete.

Q: Changes in Outlook aren't updating in Zoho.

A: This requires **Two-Way Sync**. Your Admin must grant **Microsoft Admin Consent** and enable the feature in Admin Controls.

Q: Can I sync Deals or Tasks?

A: No, currently only **Contacts** are synced bi-directionally. Other records are "Create only."

Q: What is the attachment limit?

A: You can upload files up to **10 MB** per file.